market decisions
CORPORATION

Winter Wave Survey Summary

Part of the WSTC Ferry Research Initiative

Washington State
Transportation Commission

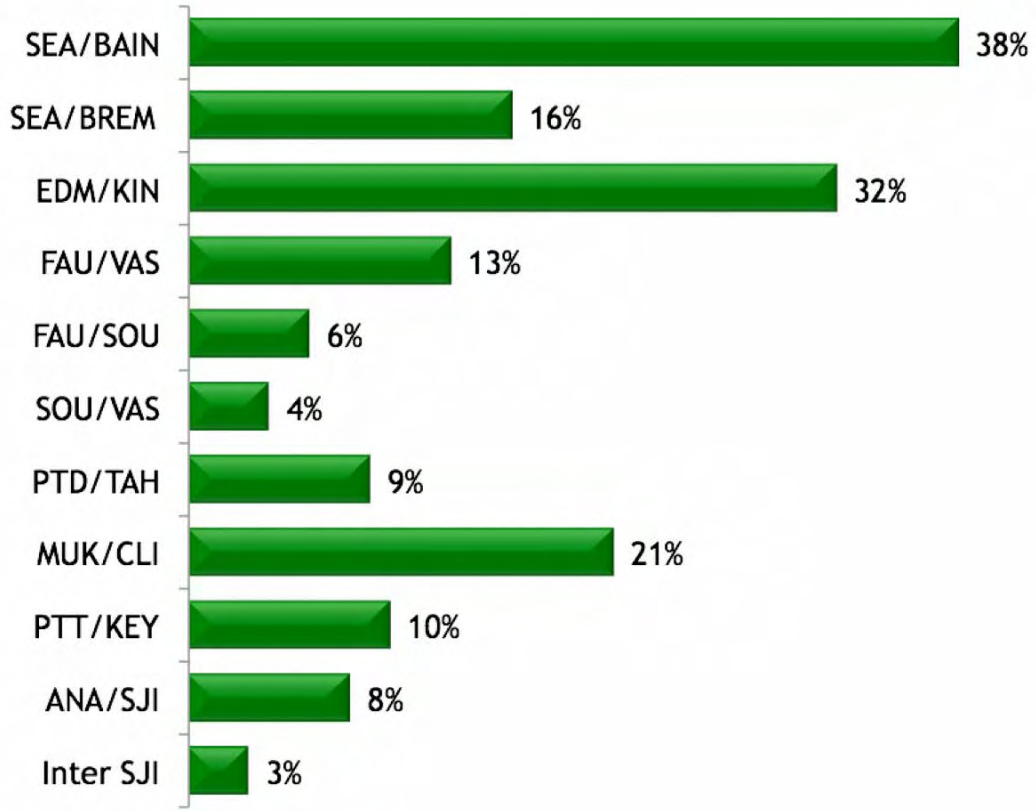
Conducted by
Market Decisions Corporation
April-May 2010

Methodology

- The following report presents the findings for the April 2010 survey. The main objective of this research is to understand from the ferry riders' prospective their travel behavior, opinions, and attitudes regarding important issues currently facing the Washington State Transportation Commission and Washington State Ferries.
  - This overall objective resulted in the following areas of exploration:
    - Winter travel activity – ferry travel from January 3 through March 27, 2010.
    - Tariff issues – gauge support of various options to manage vehicle demand and reduce congestion
    - Ferry operating costs – measure support of changes in ferry fares for out-of-state passengers and summer surcharge
    - Transit connections – determine impact of better transit connections on ferry travel
    - Service and amenity satisfaction – measure the satisfaction and importance of services and amenities offered on the ferries
    - Profiling ferry customers – travel patterns, WSF satisfaction and demographic data
- A total of four thousand one hundred seventy-two (n=4,172) ferry riders completed the April 2010 survey yielding a maximum sample variable of +/- 1.5% at the 95% confidence level.
  - A total of four thousand twenty-seven (n=4,027) ferry riders completed a web survey between April 6, 2010 and May 10, 2010.
  - A total of one hundred forty-four (n=144) paper surveys were completed between April 29, 2010 and May 28, 2010.
- In order to make the survey results proportionate to the ferry ridership universe as a whole, it was necessary to weight the data by route and boarding method based on their last trip taken.
  - For additional details please see Appendix C.
- Due to respondents who either did not answer certain questions or selected no response or don't know, the question bases vary throughout the report.
  - Small sample sizes, those n=30 or less, will be called out on each slide, if present.

Winter Period Ridership - Overall

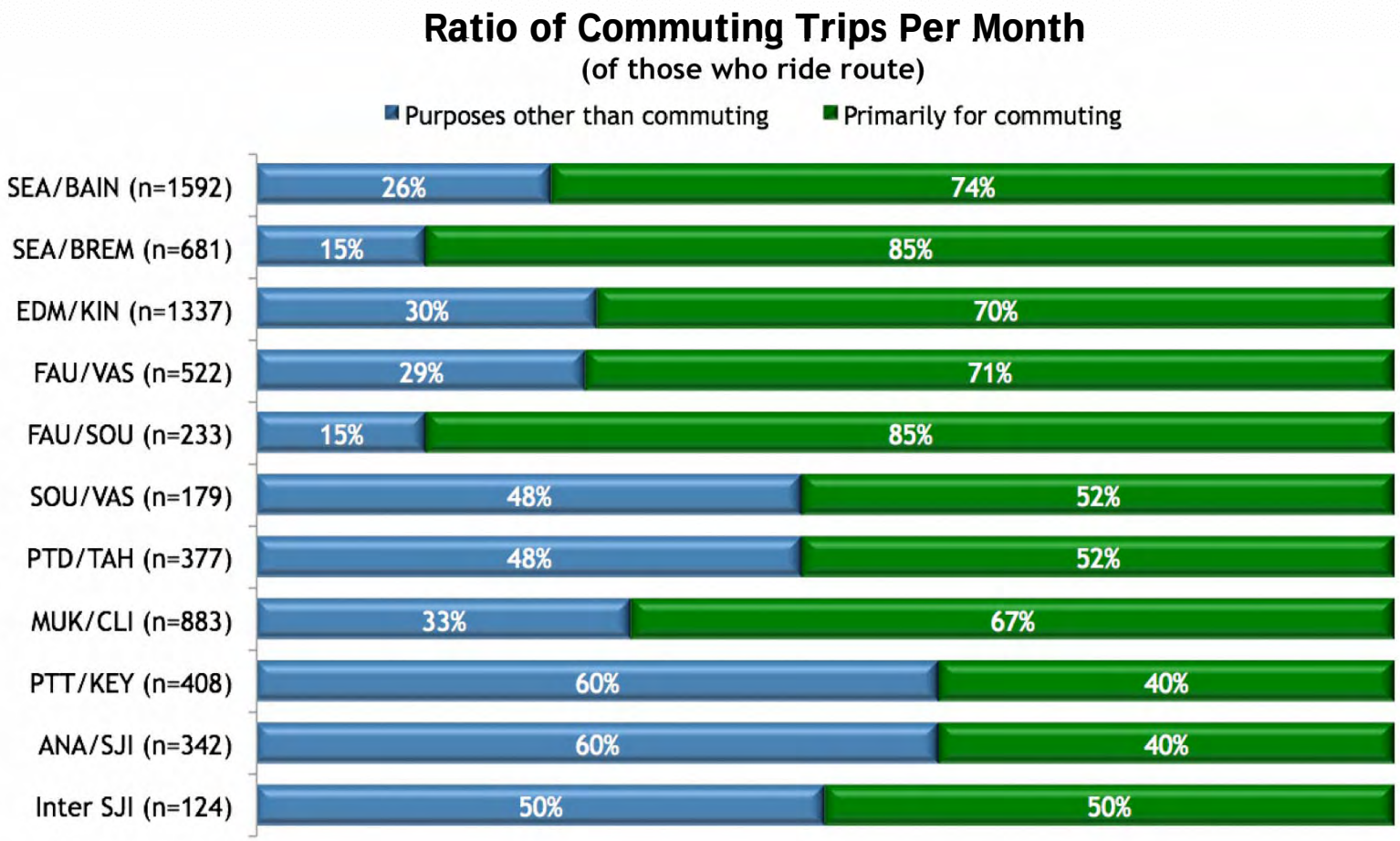
Route Ridership (n=4,173)



Avg. # of trips per month per rider		Seasonality Index 1st Qtr	
2010	2008	2010	2009
11.2	11.4	0.99	1.04
13.1	11.9	1.06	1.00
7.6	8.0	1.05	1.04
13.5	15.4	1.02	1.05
13.4	10.8	0.96	1.07
5.6		1.01	1.10
6.5	14.4	1.02	0.98
13.4	10.0	1.04	1.02
3.0	5.7	0.87	0.54
4.2	2.7	0.69	0.75
4.0	n/a	1.71	1.01

S1 For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Winter Schedule period, January 3rd through March 27th. For the routes shown below, how many round trips (two one-way trips = one round trip) per month do you take, on average, during the Winter Schedule period?

Winter Period Ridership – Commuting Trips



S2 *For this survey, we are interested in your experiences and opinions of Washington State Ferries during the Winter Schedule period, January 3rd through March 27th. How many of those trips were for primarily commuting (getting to and from work/school) purposes?*

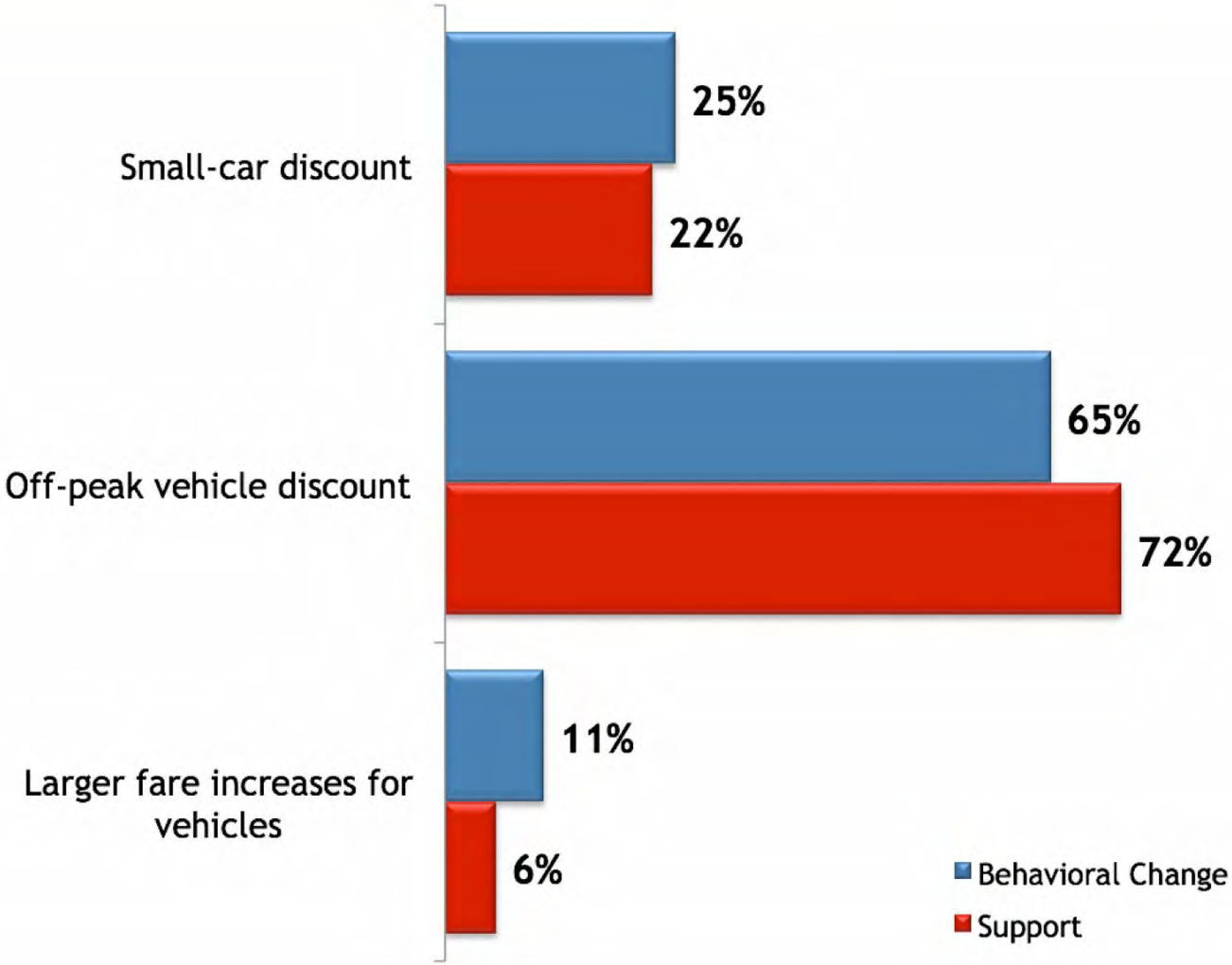
Conjoint Exercise

- The 2010 WSTC April Ferries survey included a conjoint exercise designed to assess the potential efficacy of three difference alternative approaches to manage vehicle demand and reduce congestion in peak travel periods on the ferry system:
  - Discounts for vehicles significantly under the current 20-foot standard length (so we can carry more vehicles per ferry). The discounts would vary by vehicle length, with different discounts for vehicles…
    - …14' or less in length (such as a Kia Rio, Hyundai Accent, VW Beetle)
    - …13' or less in length (such as a Pontiac G3, Mini Cooper, Toyota Yaris)
    - …12' or less in length (such as a Smart Car)
  - Discounts for taking vehicle trips during off-peak periods; (to reduce vehicle wait time at peak hours); and
  - Larger increases in vehicle fares, than for passenger fares (to encourage more car pooling and walk-on passengers.
- Respondents were asked to rate each of nine different combinations of these three attributes on two scales:
  - How supportive they would be of using each potential option set to reduce peak vehicle demand; and
  - How the option set might impact their peak period vehicle usage on the ferry if it was enacted.
  - Respondents who said the option sets would have no impact as they don't take a vehicle on the ferry during peak hours were not asked the second question.
- The complete set of profiles seen by each respondent is shown on the following page.

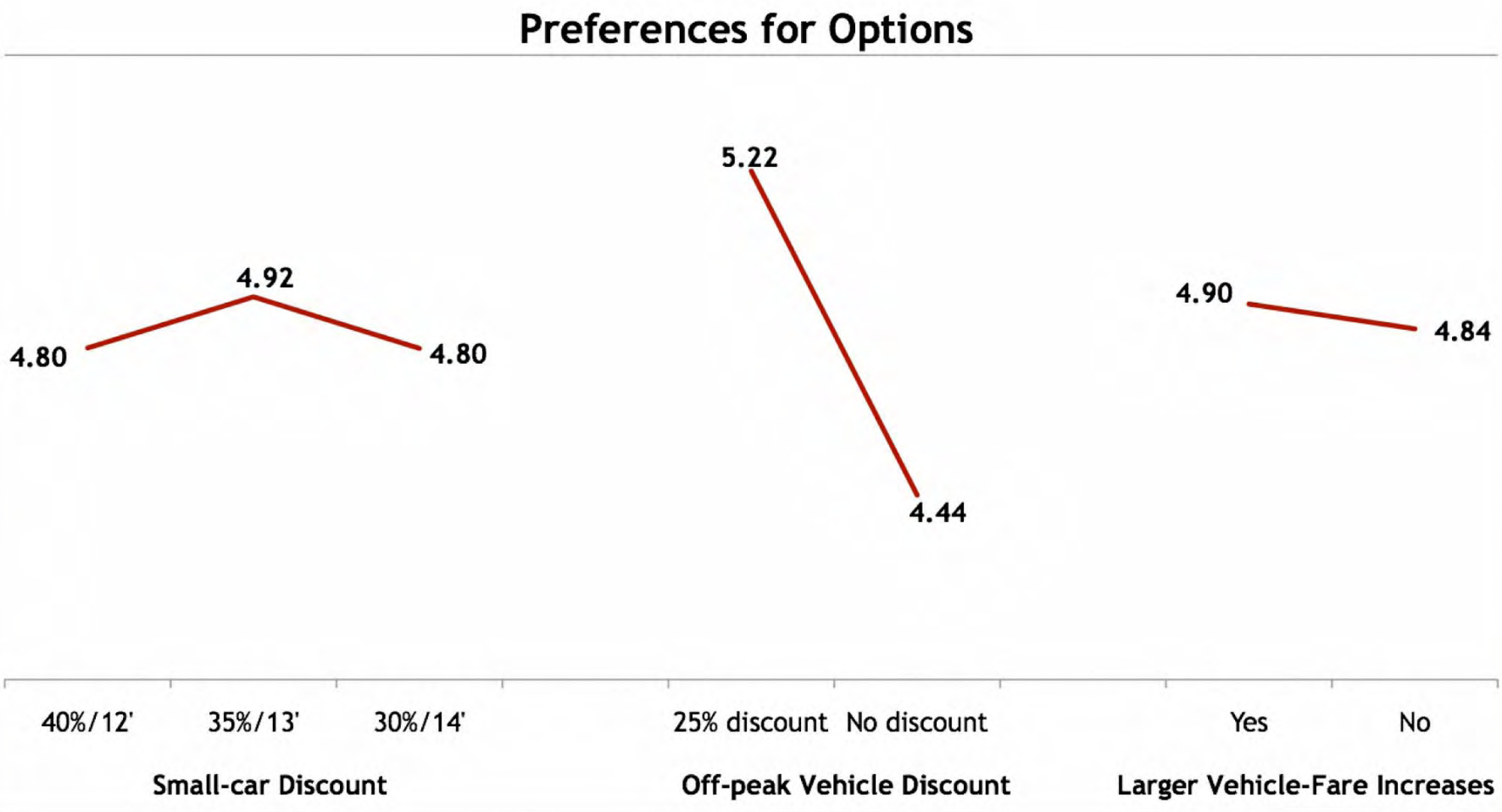
Conjoint Profiles

	Option 1	Option 2	Option 3
Small-car discount	A **35%** discount for vehicles **13' or less** in length	A **40%** discount for vehicles **12' or less** in length	A **35%** discount for vehicles **13' or less** in length
Off-peak vehicle discount	A **25% off-peak** vehicle discount offered	A **25% off-peak** vehicle discount offered	No off-peak vehicle discount
Larger fare increases for vehicles	No, when fares increase the percent increase is the **same for both** vehicles and passengers	No, when fares increase the percent increase is the **same for both** vehicles and passengers	Yes, when fares increase, **vehicle fares increase by a higher percent** than passengers
	Option 4	**Option 5**	**Option 6**
Small-car discount	A **35%** discount for vehicles **13' or less** in length	A **30%** discount for vehicles **14' or less** in length	A **30%** discount for vehicles **14' or less** in length
Off-peak vehicle discount	A **25% off-peak** vehicle discount offered	**No off-peak** vehicle discount	A **25% off-peak** vehicle discount offered
Larger fare increases for vehicles	Yes, when fares increase, **vehicle fares increase by a higher percent** than passengers	Yes, when fares increase, **vehicle fares increase by a higher percent** than passengers	Yes, when fares increase, **vehicle fares increase by a higher percent** than passengers
	Option 7	**Option 8**	**Option 9**
Small-car discount	A **30%** discount for vehicles **14' or less** in length	A **40%** discount for vehicles **12' or less** in length	A **40%** discount for vehicles **12' or less** in length
Off-peak vehicle discount	No off-peak vehicle discount	No off-peak vehicle discount	A **25% Off-peak** vehicle discount offered
Larger fare increases for vehicles	No, when fares increase the percent increase is the **same for both** vehicles and passengers	Yes, when fares increase, **vehicle fares increase by a higher percent** than passengers	Yes, when fares increase, **vehicle fares increase by a higher percent** than passengers

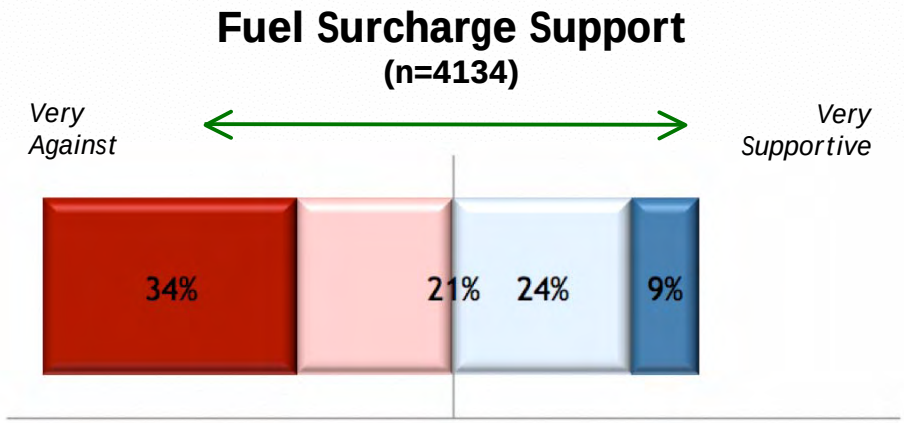
Importance of the Attributes



Preferences for Options - Support



Fuel Surcharge



Only ratings of support (4-5) or lack of support (1-2) are shown.
Ratings of 3 or don't know are not shown.

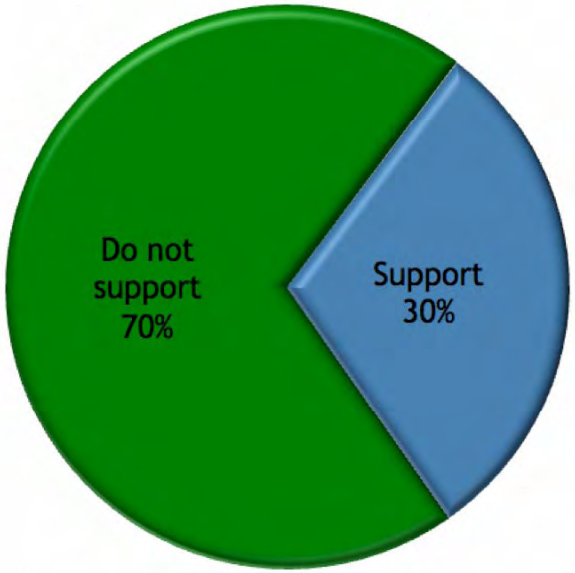
Fuel Surcharge Maximum	Total n=4173
Capped at 20% of the fare regardless of how much it covers extra fuel costs	44%
Capped at $5 above base fare regardless of how much it covers extra fuel costs	20%
No maximum amount; the surcharge should cover the extra cost of fuel	11%
Don't know	25%

Fuel Surcharge Implementation	Total n=3891
Apply it **across all fares** (on both vehicle & passenger) equally	45%
Apply it to **vehicles only** (on both single and discounted multiple vehicle fares)	31%
Apply it to **all single-trip fares** (discounted multiple fares would not be charged the surcharge)	24%

Q3 How supportive would you be of a fuel surcharge on ferry fares to recoup some of the cost of higher than expected fuel costs?
Q4 Which of these do you feel would be the best way to set a maximum amount on the surcharge?
Q5 Which of these do you feel would be the most appropriate way for the surcharge to be applied?

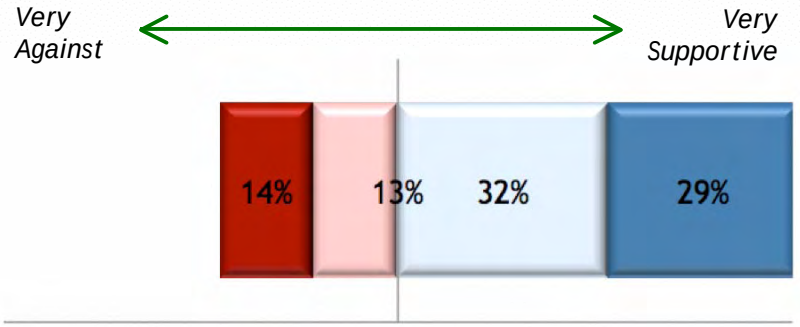
Higher Fares for Non-Residents

Higher Fares for Non-Residents
(n=3,995)



arge
% More

Support Given Extra Time Needed
(n=1,199)

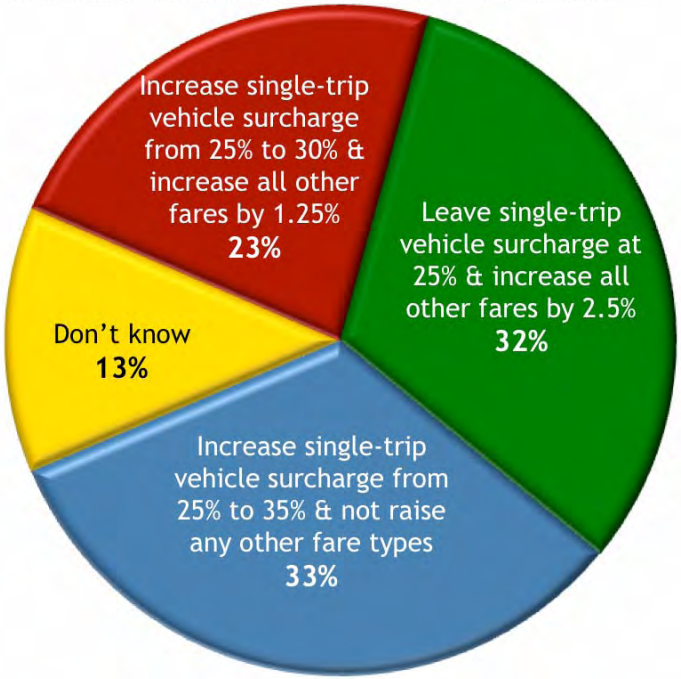


Only ratings of support (4-5) or lack of support (1-2) are shown. Ratings of 3 or don't know are not shown.

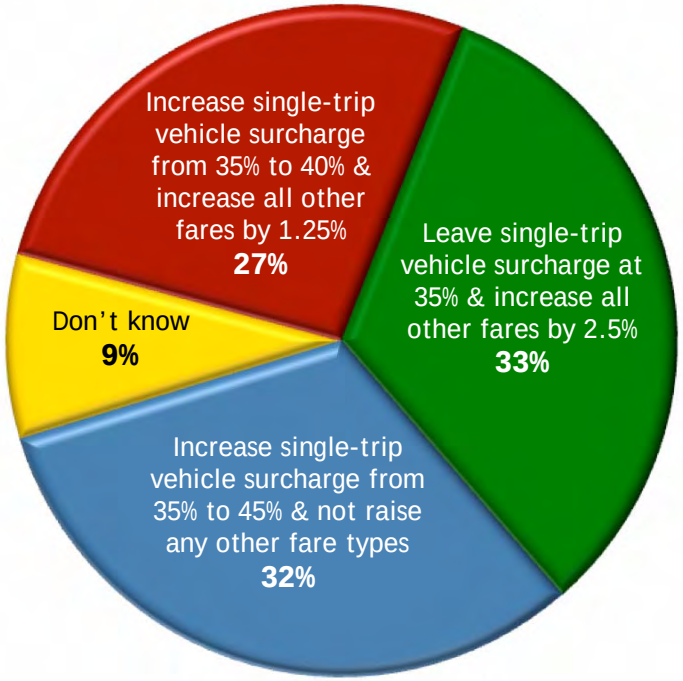
Q6 How you would feel about introducing higher fares for out-of-state ferry passengers?
Q7 What percent more should non-residents be charged than residents for ferry travel?
Q8 How supportive would you be of this type of program given that extra time could be needed to verify residency?

Summer Surcharge

Preference of Summer Surcharge Options on Non San Juan Routes
(n=3,906)



Preference of Summer Surcharge Options on San Juan Routes
(n=352)



Q9a/b The summer surcharge on single-trip vehicle fares has been 25% (the summer surcharge in the San Juan area on single-trip vehicle fares has been 35%), which means infrequent and recreational users pay a higher ticket price than those who use multi-ride discount tickets. The Transportation Commission is looking at three options for the summer surcharge program. Given the importance of tourism and keeping fares down while managing overall costs, which of the following options would you most prefer?

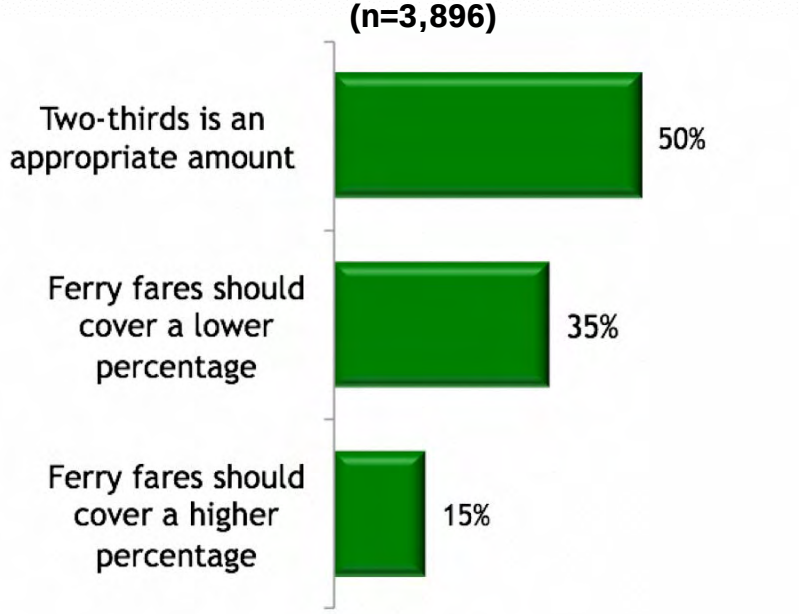
WSF Operational Costs

58%
Estimated ferry fare coverage of WSF's operational costs (n=4,058)

VS.

66%
Actual ferry fare coverage of WSF's operational costs

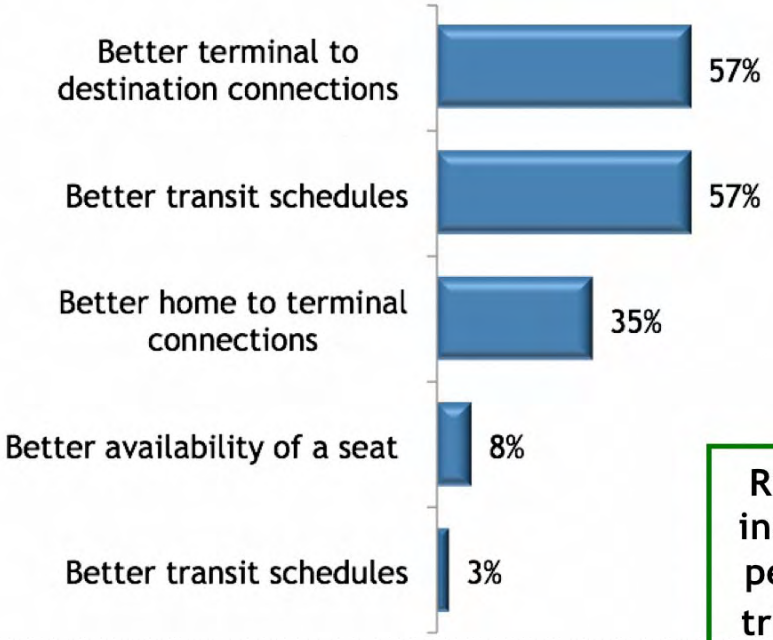
Coverage of WSF's Operational Costs
(n=3,896)



Q10 What percentage of WSF's annual operational costs do you think fares currently cover?
Q11 On average, fares cover about two-thirds of the ferries' yearly operating costs. The other third is subsidized by gas taxes raised from citizens across Washington State. Knowing that, do you feel ferry fares should cover a higher, lower, or the current percentage of yearly ferry operational costs?

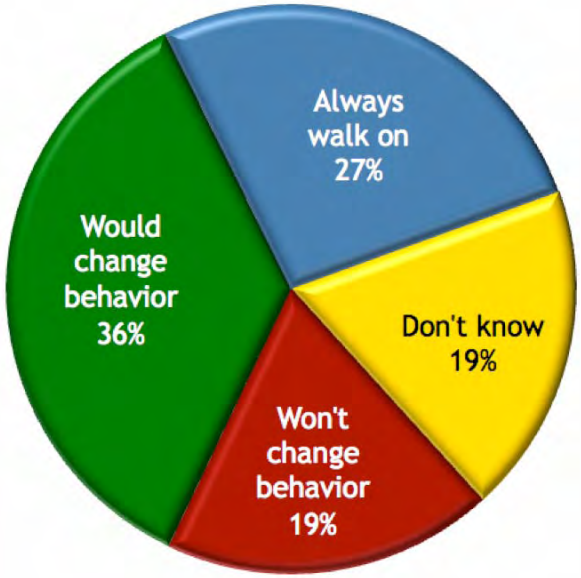
Transit Services

Defining Better Transit Services & More Reliable Connections



Impact of Better Transit Services & More Reliable Connections on Peak Trips

(n=3,502)



Riders would increase their peak walk-on trips by 37%.

Q12 *What percent of your trips would you walk on during peak periods if better transit services and more reliable connections were available?*

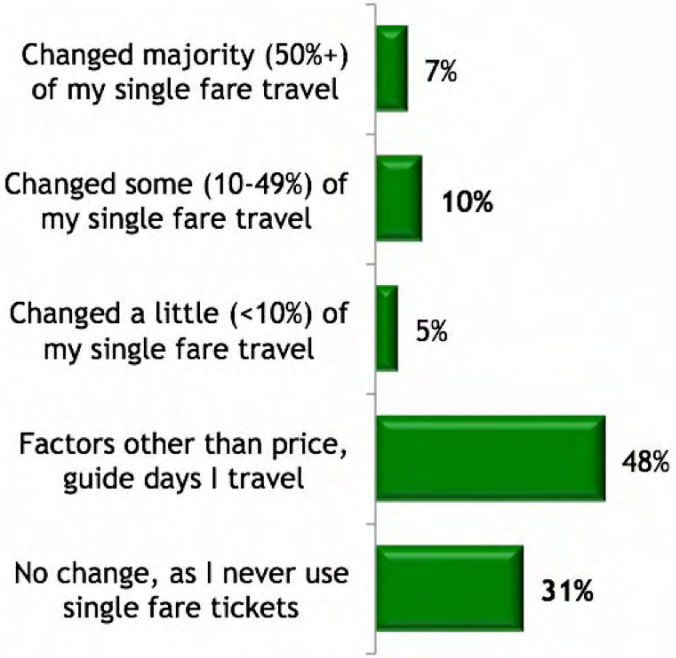
Q14 *Of the Q12% more walk-on trips you would make during peak periods if there were better transit services and more reliable connections, what percentage of the Q12% would be for commuting (getting to and from work/school)?*

Q13 *What does "better transit services and more reliable connections" mean to you?*

San Juan Early/Late Week Fares

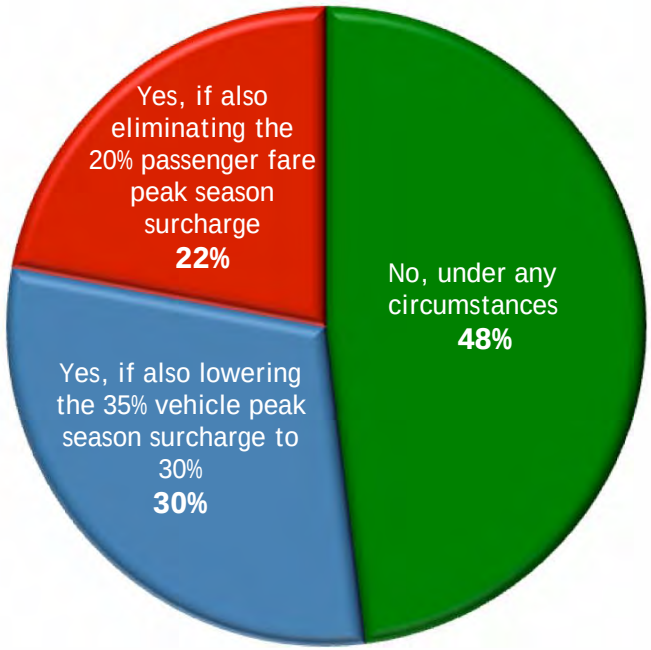
Influence of Early/Late Week Fare Structure

(n=344)



Elimination of Early/Late Week Fare Structure

(n=344)

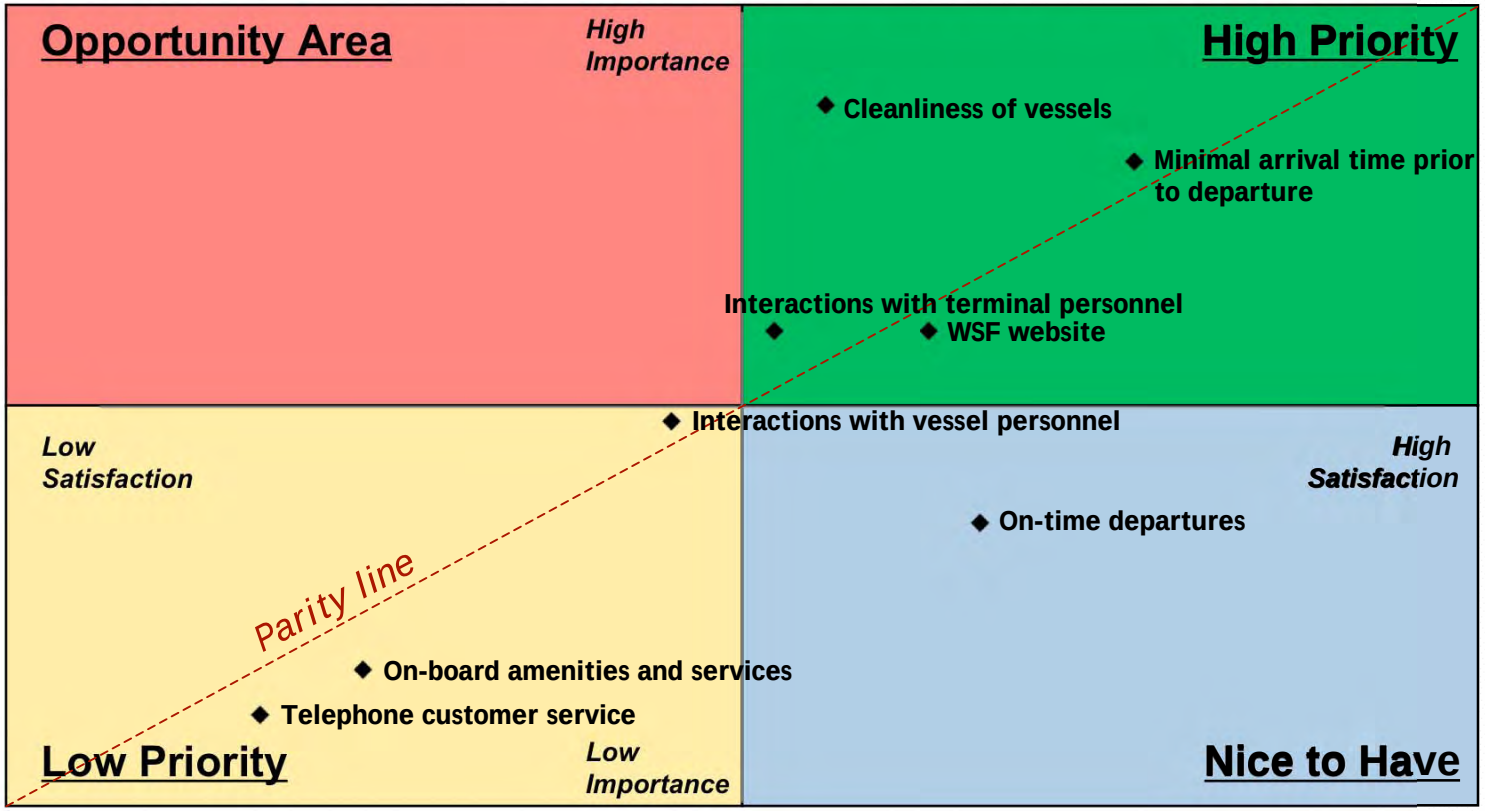


Q15a *In the early 2000s, the Anacortes to San Juan Islands fares were modified to include a price differential for those that traveled early in the week versus later. Customers purchasing a single vehicle or passenger ticket pay less if they travel Sunday through Tuesday early week than if they travel Wednesday through Saturday late week. Customers utilizing multi-ride cards are not affected. Has this early / late week fare structure influenced the days of week that you travel?*

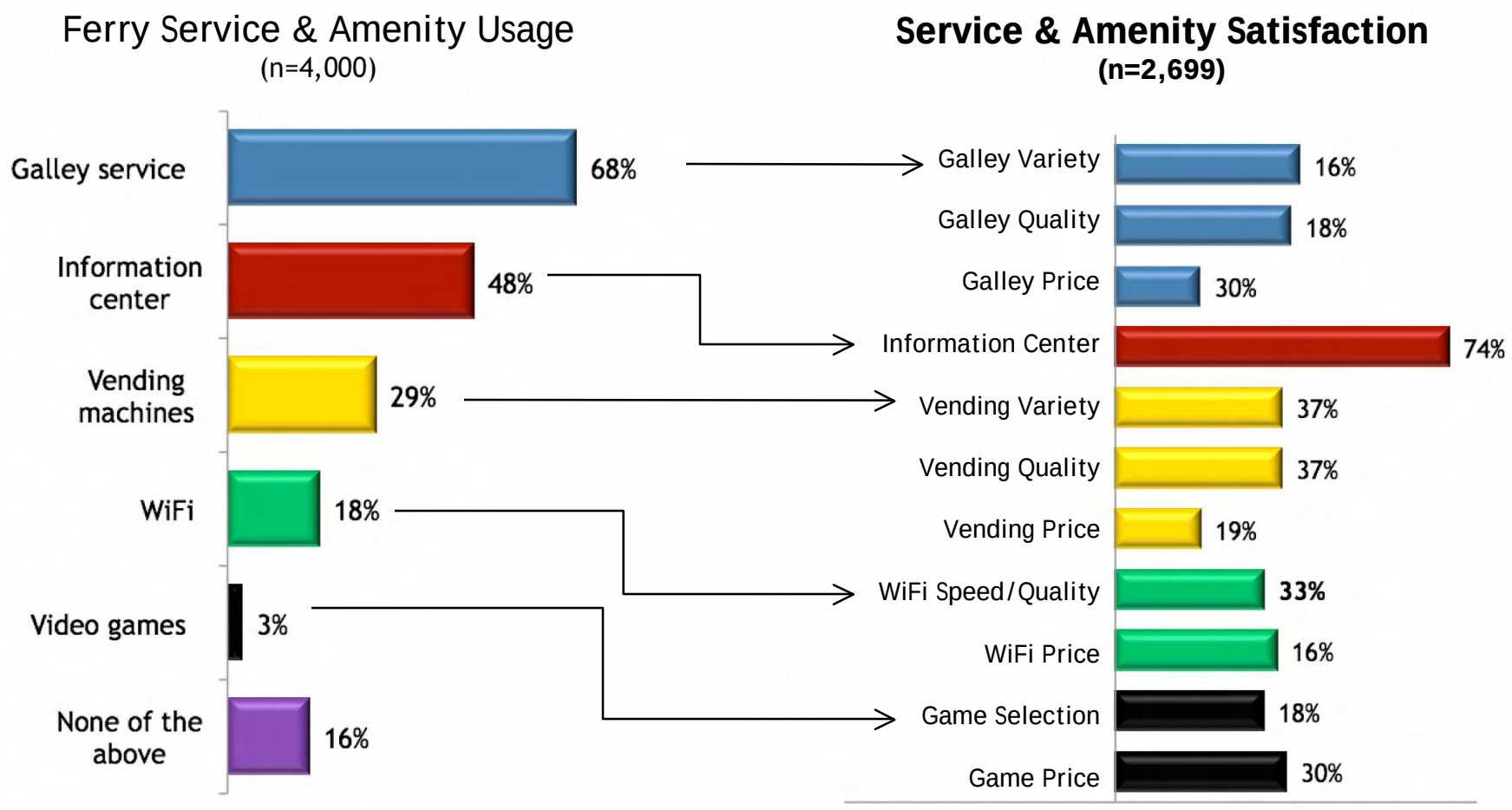
Q15b *Would you be in favor of eliminating the 10% early week discount Sunday through Tuesday for single fares?*

Gap Analysis

Satisfaction vs. Importance Ratings



Ferry Services & Amenities Usage

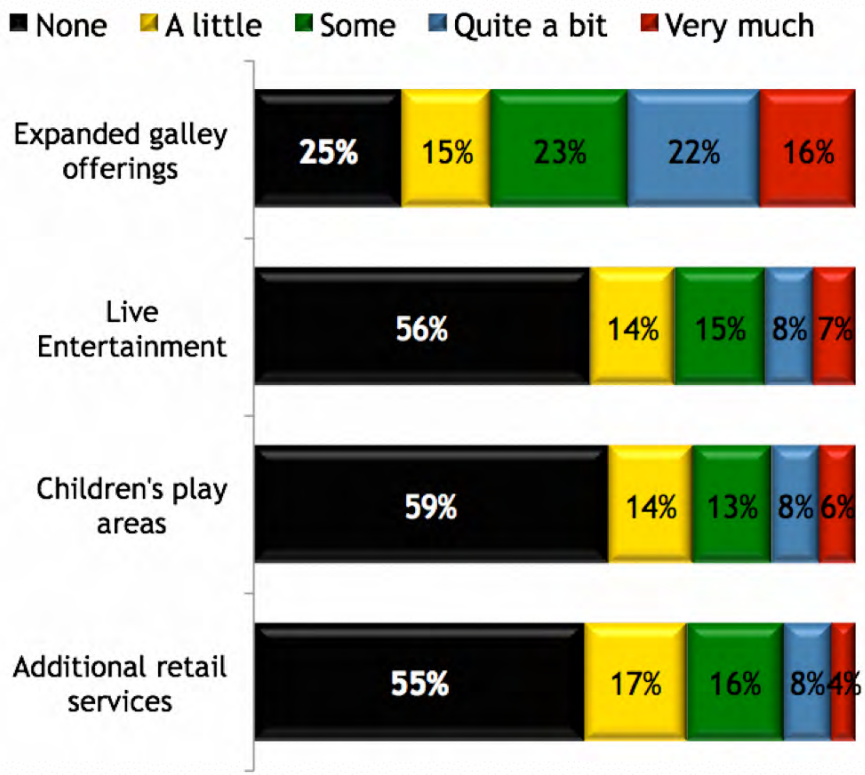


Q17 Listed below are some services and amenities. For each one, please indicate if you use the service or amenity.
Q18a-e How satisfied are you with the following aspects of the …?

Additional On-Board Services & Amenities

Interest in New On-Board Services & Amenities

(n=3,942)

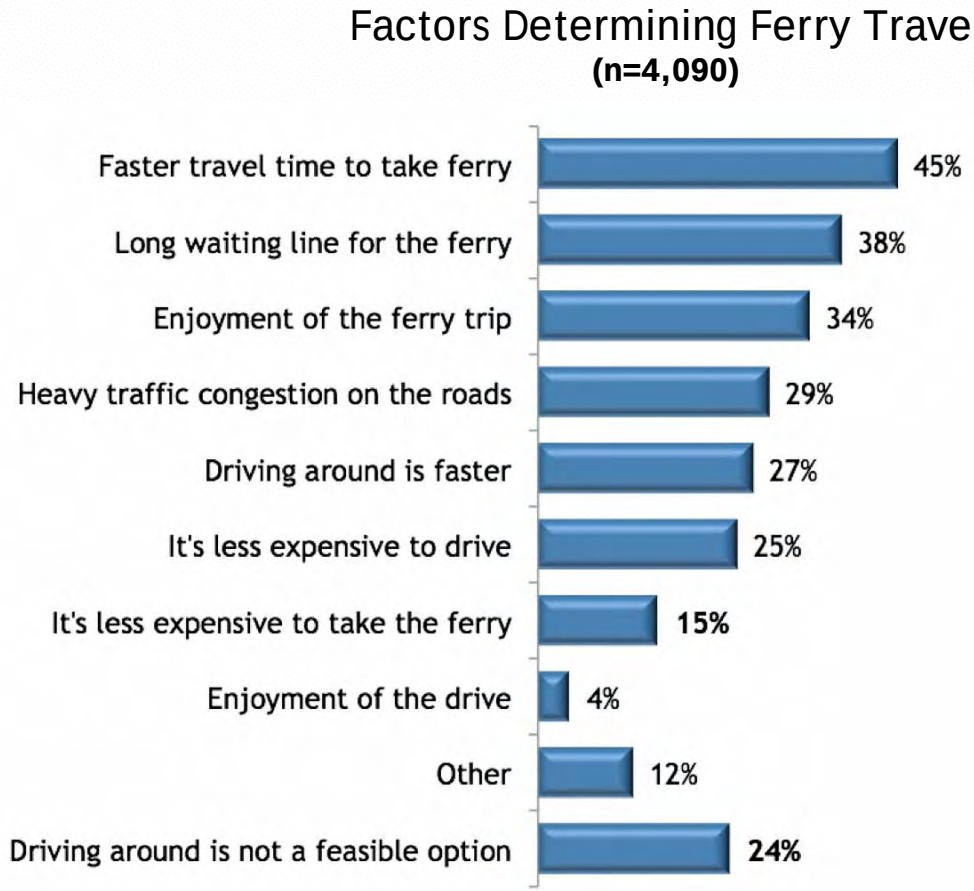


Top Suggested Services & Amenities

(n=1,637)

Q19 *How interested would you be in each of the following possible new on-board services or amenities?*
Q20 What, if any, services or amenities would you likely use if it was offered on your ferry?

Factors Determining Ferry Travel



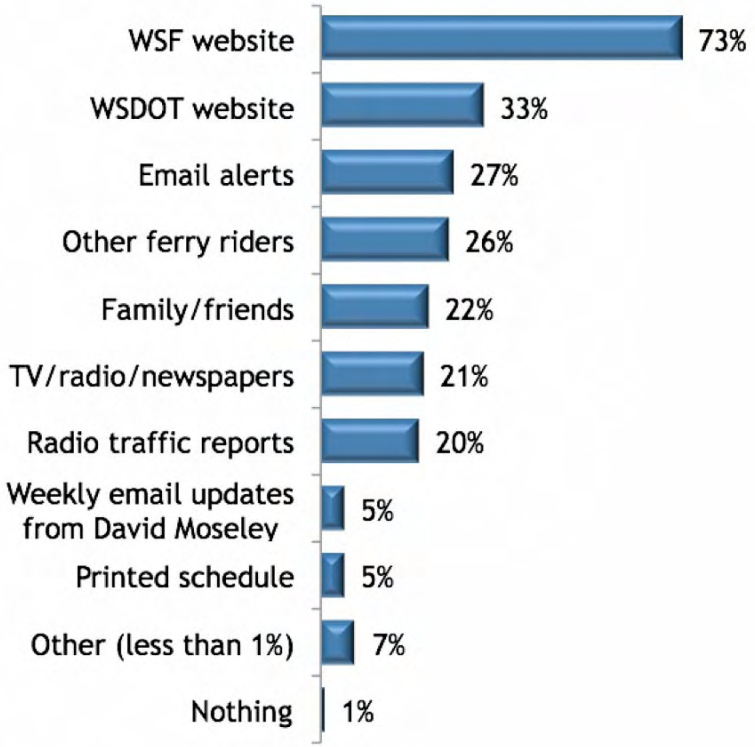
Most Important Factor
22%
16%
9%
6%
7%
7%
3%
0%
7%
24%

Q21 *When considering whether to drive around or take the ferry (for routes where it is feasible to drive around), which of these are key factors in your decision?*

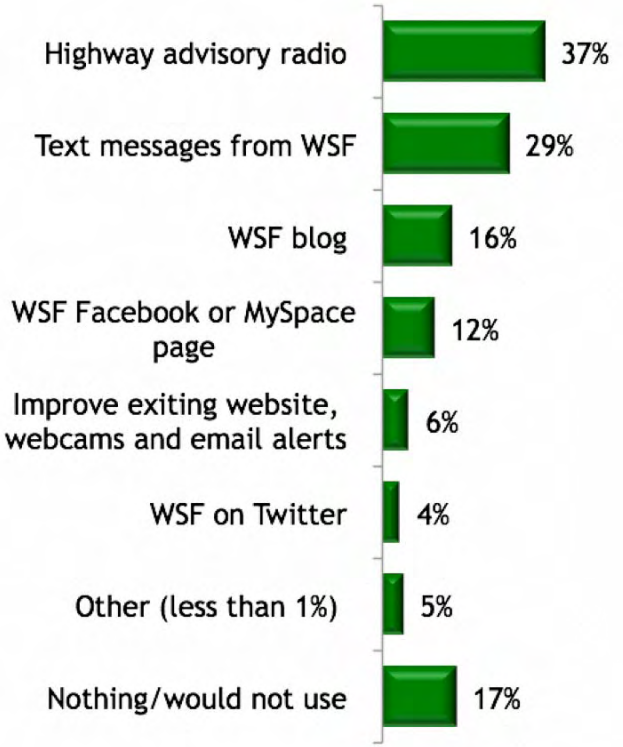
Q22 *Which is the most important factor?*

WSF Information

Current Sources of WSF Information
(n=4,160)



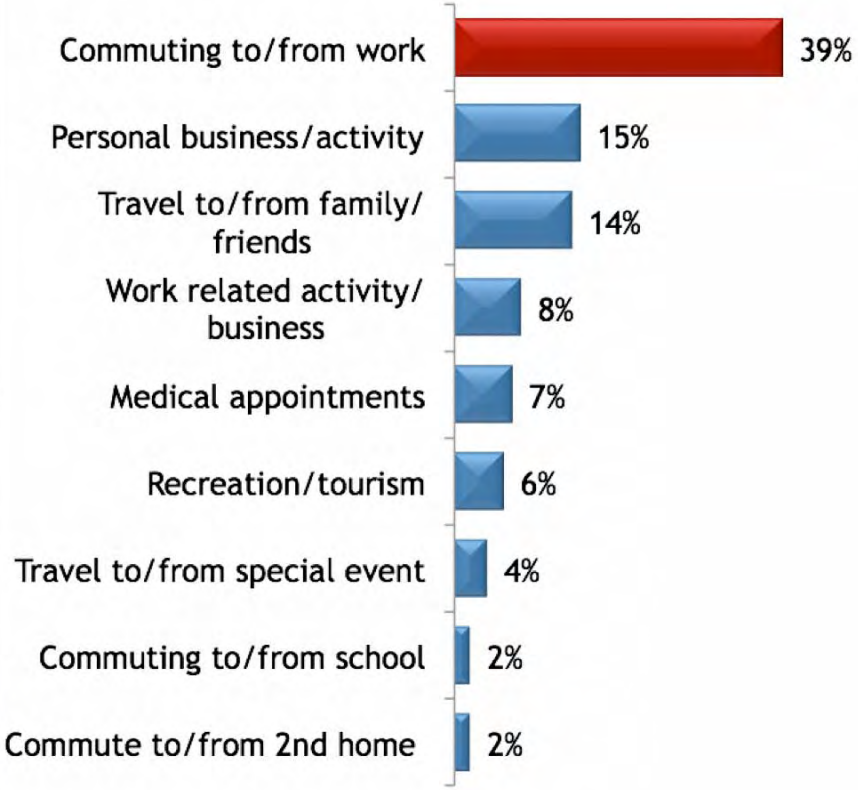
Suggested Sources of WSF Information
(n=4,088)



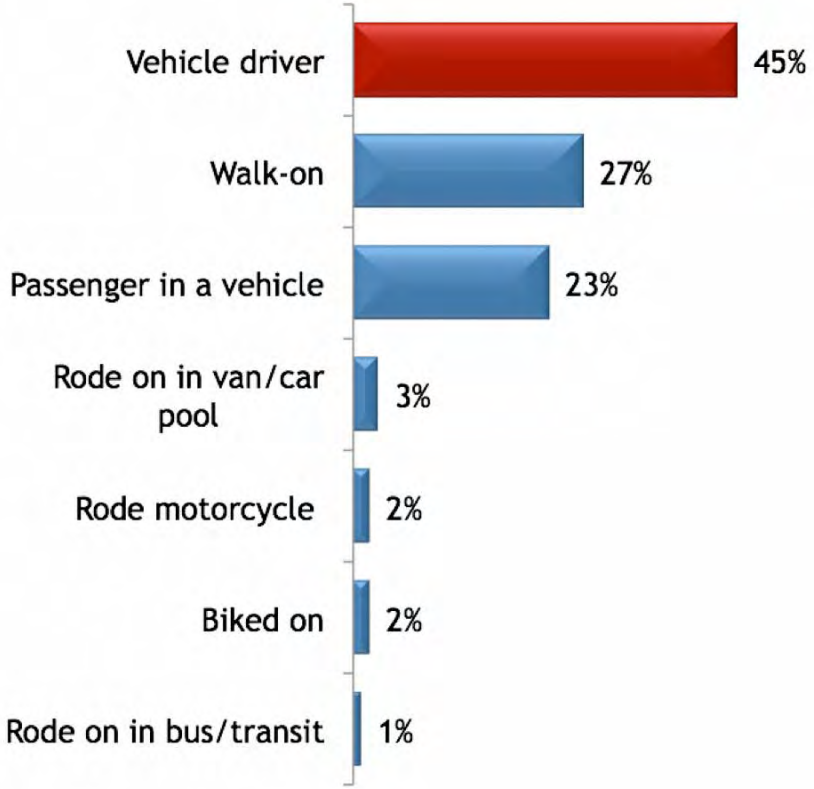
Q23 Which of the following do you use to obtain information about Washington State Ferries?
Q24 Which of the following, if it were available, would you obtain to find information about Washington State Ferries?

Last Ferry Ride

Trip Purpose
(n=4,172)



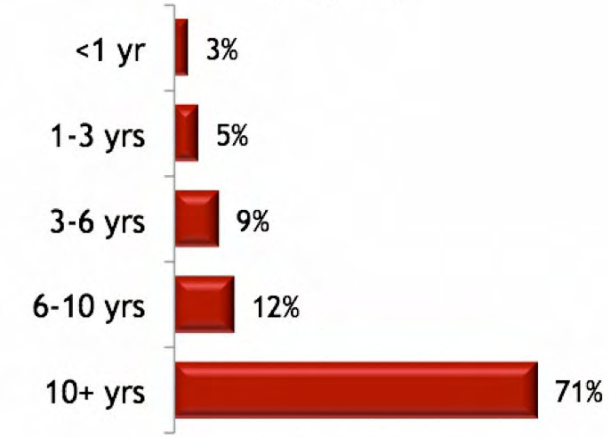
Boarding Method
(n=4,171)



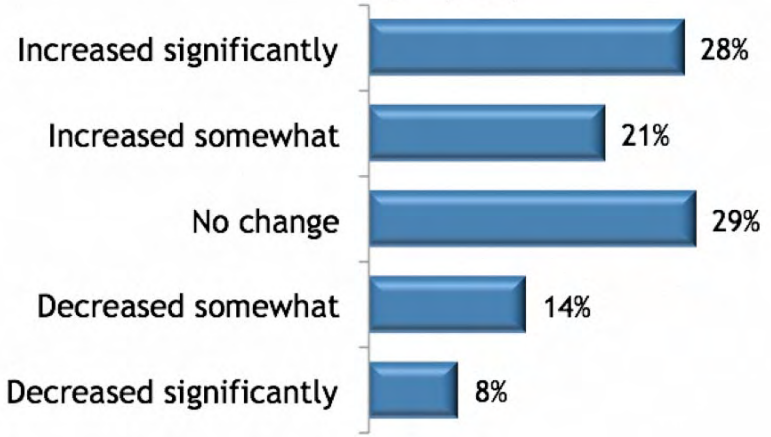
Q28 Thinking about your LAST FERRY RIDE ONLY, which of the following was the PRIMARY PURPOSE for that specific trip?
Q29 Thinking about your LAST FERRY RIDE ONLY, were you the vehicle driver, a passenger in a vehicle or did you walk onto the ferry?

Rider Profile

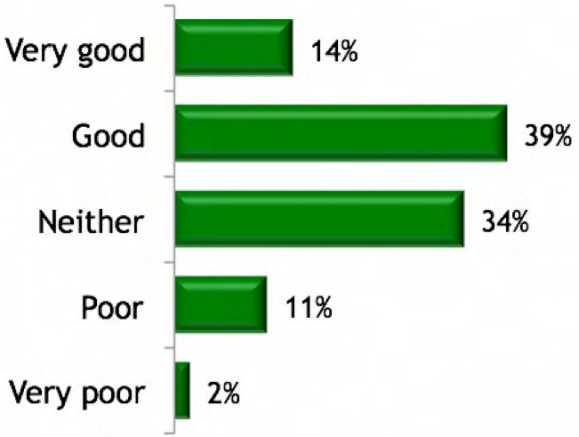
Years Riding the Ferries
(n=4,171)



Ridership Frequency
(n=4,170)



Ferry Value
(n=4,170)



Rider Satisfaction
(n=4,170)